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From left, Joel Bruckenstein, T3 president, and Bob Veres, Inside Information owner, present the findings from the 2025 T3/Inside Information Software Survey at the Technology Tools for Today (T3) Conference on March 4 in Dallas.

Rob Burgess

AI adoption surging in wealth management, T3 survey shows
By Rob Burgess
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To see how the wealth management industry has changed over the past few years in terms of the adoption of artificial intelligence tools, look no further than the new categories included in the 2025 T3/Inside Information Software Survey.

For the first time, the results — released Tuesday evening at the Technology Tools for Today (T3) Conference in Dallas — included categories for alternative

platforms, generative language AI, search AI and graphics AI.

This year's survey polled 2,128 respondents in an attempt to determine the market share of more than 300 programs across 45 different tech categories.

The survey found that more than four in 10 (41%) advisors are using one or more search or generative AI tools.

"The market share two years ago would have been roughly zero," said Bob Veres, Inside Information owner. "It's now 41%. That's pretty quick."

Of the advisors who use these AI solutions, by far the most popular was ChatGPT, with 35.71% market share, followed by Microsoft Copilot, with 12.12%; Google Gemini, with 6.86%; Perplexity, with 6.06%; Anthropic (Claude.AI), with 3.29%; Apple Intelligence, with 2.58%; and Samsung AI, with 0.42%.

"I was a little surprised that some of the others didn't get slightly high on market share," said Joel Bruckenstein, T3 president.

The highest satisfaction ratings among advisors were earned by Perplexity, with 8.26 out of 10, and Anthropic (Claude.AI), with a score of 8.10. Following behind in terms of satisfaction were ChatGPT, with 8.07; Microsoft Copilot, with 7.39; Google Gemini, with 7.38; Apple Intelligence, with 6.36; and Samsung AI, with 5.33.

According to the survey's methodology, any rating of 7 or above represents satisfaction, anything above 7.50 is above-average and above 8.0 is remarkable.

Though it scored lower in satisfaction than other programs, Microsoft Copilot was at the top of the list of AI programs that advisors are "considering," with 97 reporting they were thinking about it.

"There's no surprise there," said Bruckenstein. "A lot of people have Microsoft Office already."

Following behind were ChatGPT, with 74; Google Gemini, with 52; Anthropic (Claude.AI), with 37; Apple Intelligence, with 35; Perplexity, with 22; and Samsung AI, with only 2.

"I've tried Samsung AI, so I'm not surprised by their score at all," said Bruckenstein.

Advisors indicated there are several other AI programs they use in the search or generative AI tools category that weren't rated by the survey: Grok, Jump AI, Zocks AI, AdvisorX AI, Jasper and Wealth Management GPT.

In addition to the search and generative AI tools, advisors are also utilizing the technology to create data visualizations. In the AI graphics category, Canva

scored by far the highest market share, 9.63%. Trailing far behind were Adobe Firefly, at 1.55%; Pixlr, at 0.28%; Leonardo.AI, with 0.23%; Domo, with 0.19%; Designs.ai, with 0.14%; Chatbotapp.ai, with 0.09%; and Designs AI, also with 0.09%. Users reported high satisfaction rates with both Canva, at 8.14 out of 10, and Pixlr, at 8.17 out of 10. Rating further down on the satisfaction rankings were Designs.ai, at 7.33; Leonardo.AI, at 7.2; Chatbotapp.ai, at 7; Adobe Firefly, at 6.58; Domo, 6.5; and Designs AI, at 4.

Overall, the total market penetration for these AI graphics tools was 11.37%, with an average satisfaction rating of 7.32.

The highest number of respondents (35) who were considering using AI graphics applications but hadn't yet done so said they were looking at Canva and Adobe Firefly (with 19 respondents). Rounding out the list in the single digits were Pixlr, with 6; Chatbotapp.ai and Leonardo.AI, both with 4; Designs.ai and Designs AI, both with 3; and Domo with 2.